Facilities Management

FM Key Performance Indicators

Northwestern

**March 15, 2017**

Facilities Management Key Volume Indicators

Key Volume	FM	Change	Evanston	Chicago
Full Time Equivalent (FTE)	339	+2	277	62
Acres	296	0	281	15
Buildings	213	0	200	13
Square Feet	12.4M	0	9.9M	2.5M
Number of Open Projects	79	-3	69	10
Design	23	+1	19	4
Construction	24	+1	22	2
Punchlist	5	-2	5	0
Closeout	27	-3	22	5
Value of Open Projects	$2.1B	-$0.1B	$1.6B	$0.5B
Design	$0.5B	$0.0B	$0.4B	$0.1B
Construction	$1.1B	$0.0B	$0.6B	$0.5B
Punchlist	$0.3B	$0.0B	$301.3M	$13.5M
Closeout	$0.3B	-$0.1B	$309.9M	$7.8M
Work Orders Per Reporting Month	6,031	+1.6%	4,556	1,475
Work Orders Per Rolling 12 Months	72,376	+1.6%	54,669	17,707
Operations and Maintenance	$57M	0	$41M	$16M

Key Performance Indicators

| Slide #	KPI Description	Annual Goal	Feb-17 Goal	Actual	Trend
3	SD1. Service Request Closure	85%	85%	❌ 81%	✅ 12%
4	SD2. Preventative Maintenance Closure	95%	95%	❌ 91%	❌ -3%
5	SD3. Rework	<10%	<10%	❌ 12%	✅ -3%
6	SD4. Proactivity: FM-Identified Work Orders	25%	25%	✅ 32%	✅ 4%
7	LO1. Common Space Program	5%	0.4%	✅ 0.7%	🟡 0.3%
8	LO2. Facilities Connect Implementation	100%	8%	✅ 8%	✅ 2%
9	LO3. Engagement: Sustainability Outreach	12%	1%	🟡 -1%	❌ -3%
10	CE1. Energy Use Intensity (kBtu/SF)	-5%	-5%	✅ -5.0%	✅ -6%
11	CE2. Recordable Injury Incident Rate	5.60	6.30	✅ 4.14	🟡 0.58
12	CE3. Injury-Related Lost Workday Rate	2.70	2.70	✅ 2.37	✅ -0.48
13	CE4. Waste Diversion Rate	38%	38%	❌ 32%	❌ -6%
14	CE5. Overtime	10%	15%	✅ 12%	✅ -3%
15	CE6. Minority, Female and Local Business Enterprise Use	15%	15%	🟡 13%	❌ -5%
16	CE7. Evanston Resident Employment	5%	5%	❌ 2%	❌ -2%
17	F1. Capital Project Cash Flow Execution	+/-2%	+/-2%	❌ -8%	✅ 1%
18	F2. Operating Budget Execution	+/-1%	+/-1%	✅ -1%	✅ 1%
19	F3. Utility Commodity Budget Execution	+/-5%	+/-5%	✅ -1%	❌ -1%

SD1. Service Request Closure
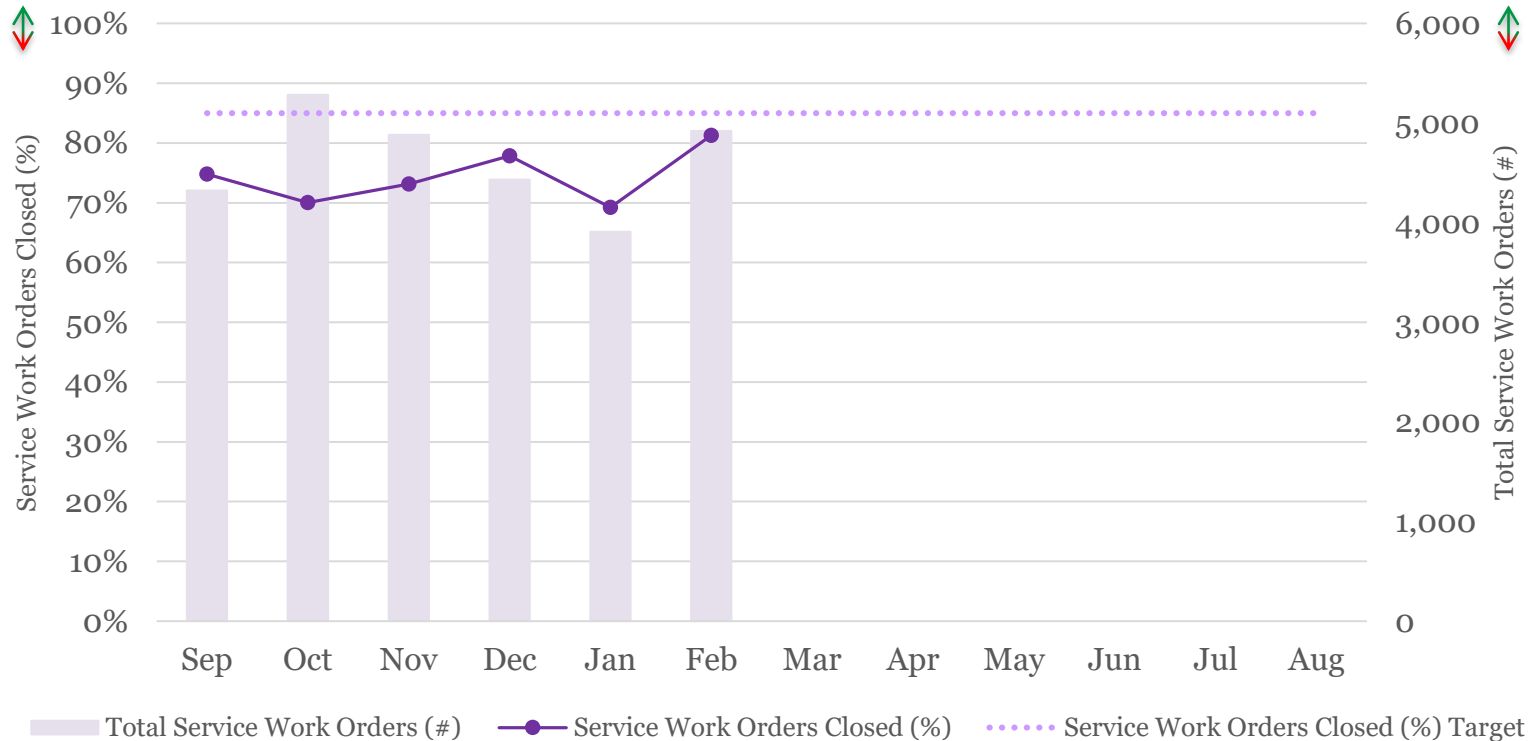
- **KPI goal is to close 85% of service work orders within 30 days (excluding project-related work orders)**
- **f(staffing, contracted services, seasonal work order volume variations, closeout procedures, service provider productivity, parts/material availability, accessibility of work areas/equipment)**
- **Initiatives: increase functionality of mobile technology; plan and schedule work order assignments including estimator and kitter functions; adjust staffing levels to reflect workload; increase service provider productivity rates**
- **FM Leader: James McKinney and Nadia Jackson**

SD2. Preventative Maintenance Closure
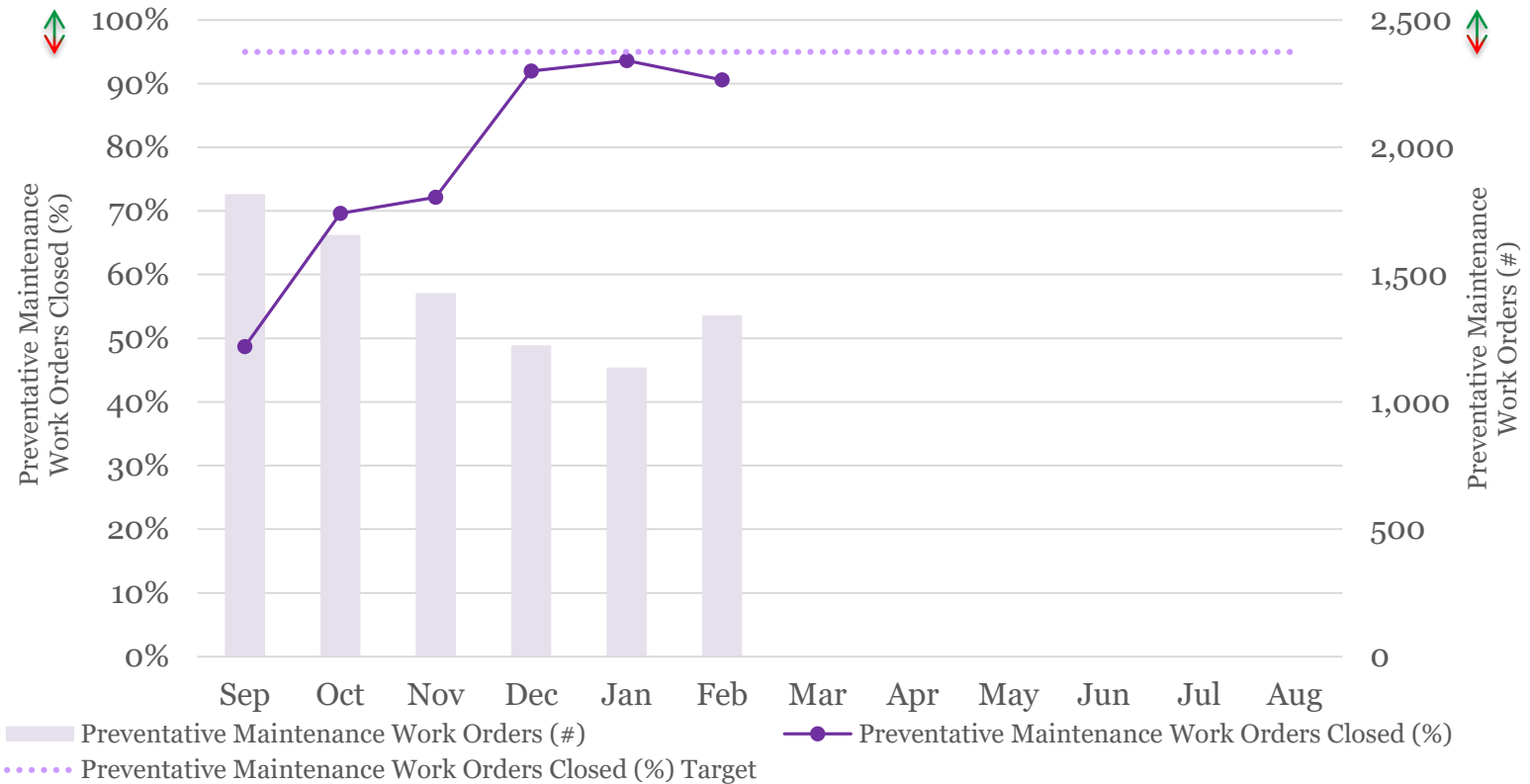
- KPI goal is to close 95% of Preventative Maintenance work orders within 30 days
- f(staffing, contracted services, seasonal work order volume variations, closeout procedures, service provider productivity)
- Initiatives: plan and schedule preventative maintenance work assignments; revise task instructions; optimize recurring task frequencies; expand equipment inventory; adjust staffing levels to reflect workload
- FM Leader: James McKinney and Nadia Jackson

SD3. Rework
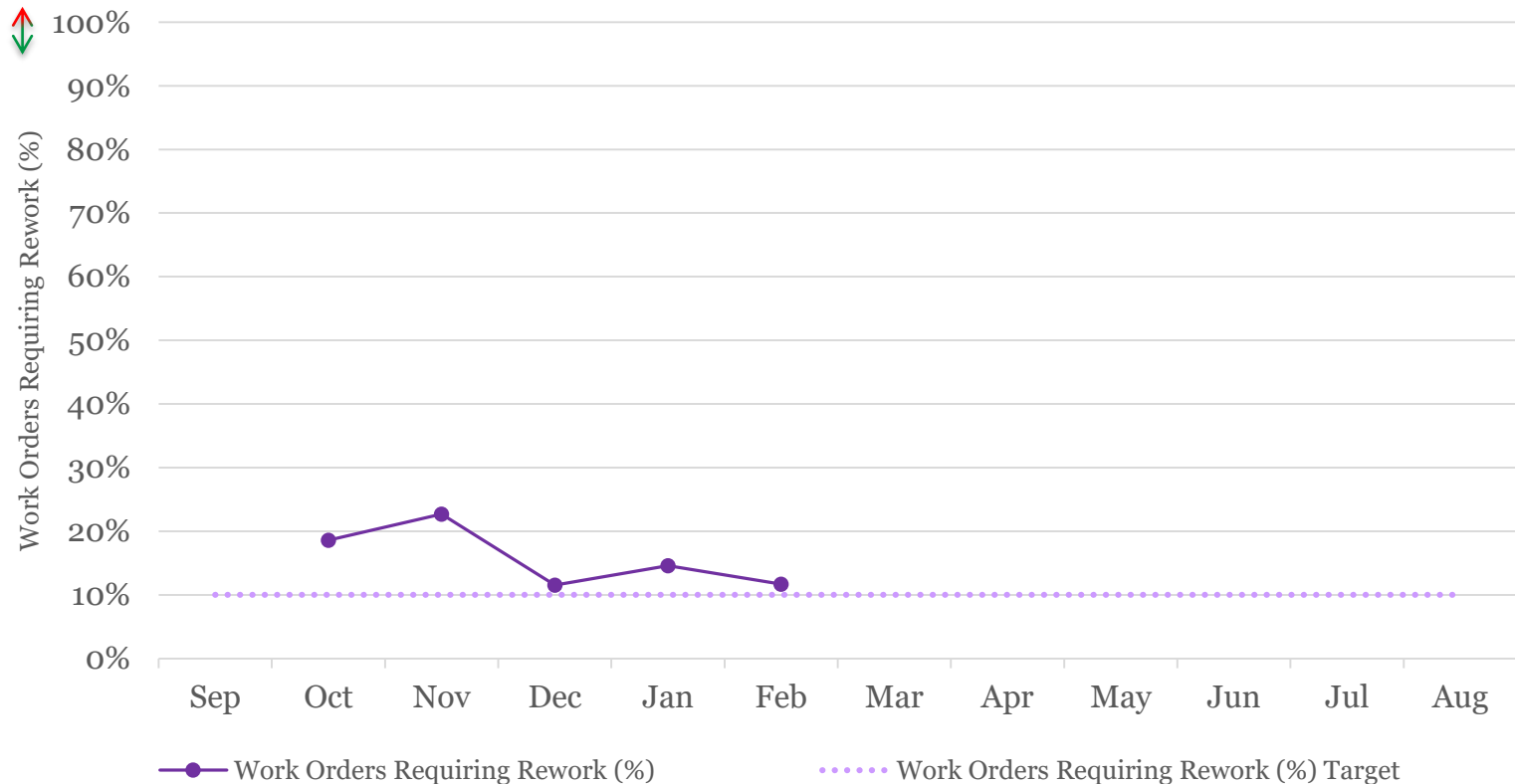
- KPI goal is to have fewer than 10% of inspected Preventative Maintenance, Corrective Maintenance and Service Call work orders require corrective rework
- f(staffing, quality of work performed, clarity of task instructions)
- Initiatives: decrease volume of contracted services; revise task instructions; institute a quality control and quality assurance program; expand service provider training programs; increase functionality of mobile technology
- FM Leader: James McKinney and Nadia Jackson

# SD4. Proactivity: FM-Identified Work Orders
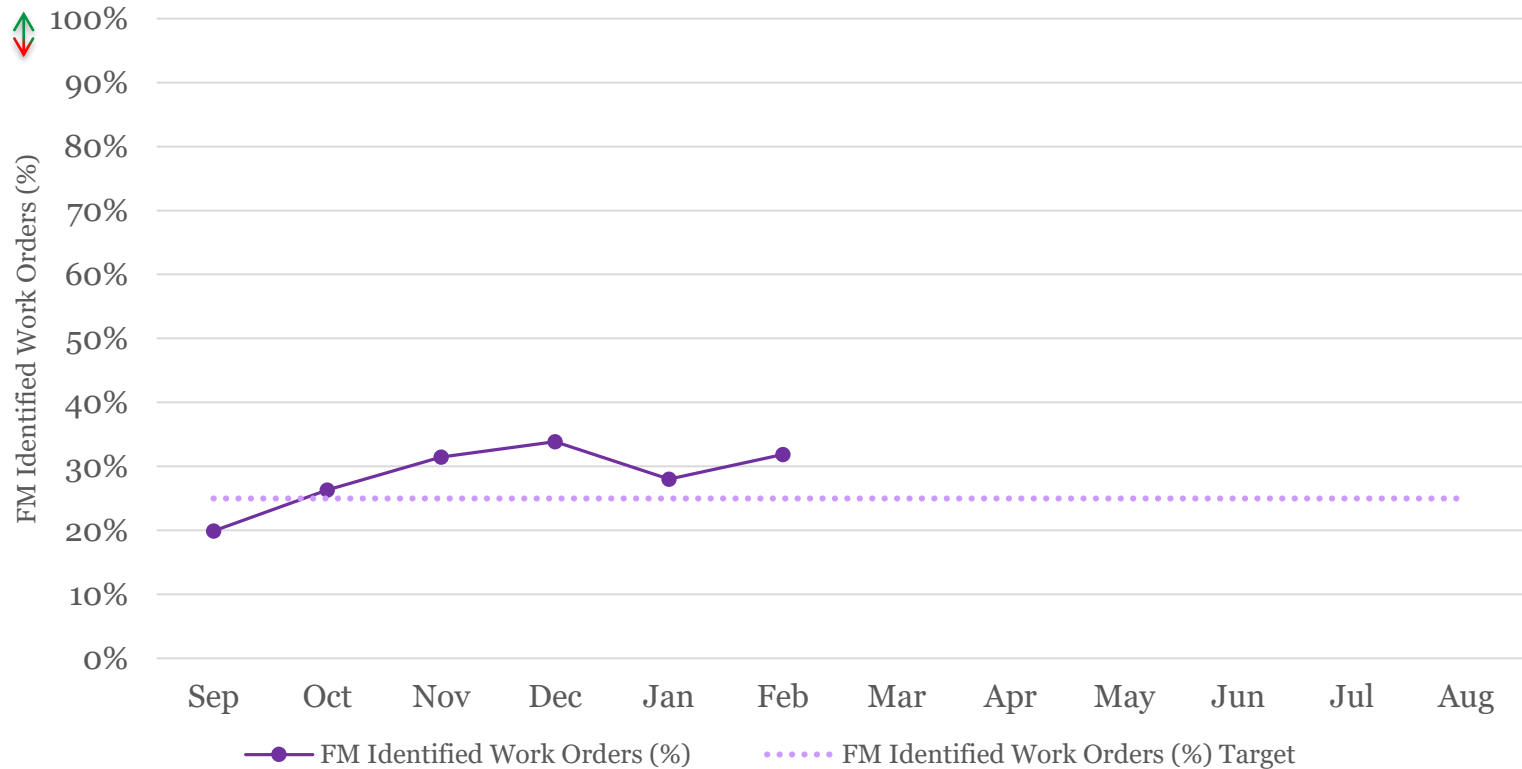
- **KPI goal is that at least 25% of corrective work orders are identified by Facilities Management Staff, as a measure of proactivity**
- **f(staffing, functionality of mobile technology, training)**
- **Initiatives: expand commissioning and preventative maintenance programs; institute quality assurance and quality control programs; increase functionality of mobile technology; implement a zone service model**
- **FM Leader: James McKinney and Nadia Jackson**

LO1. Common Space Program
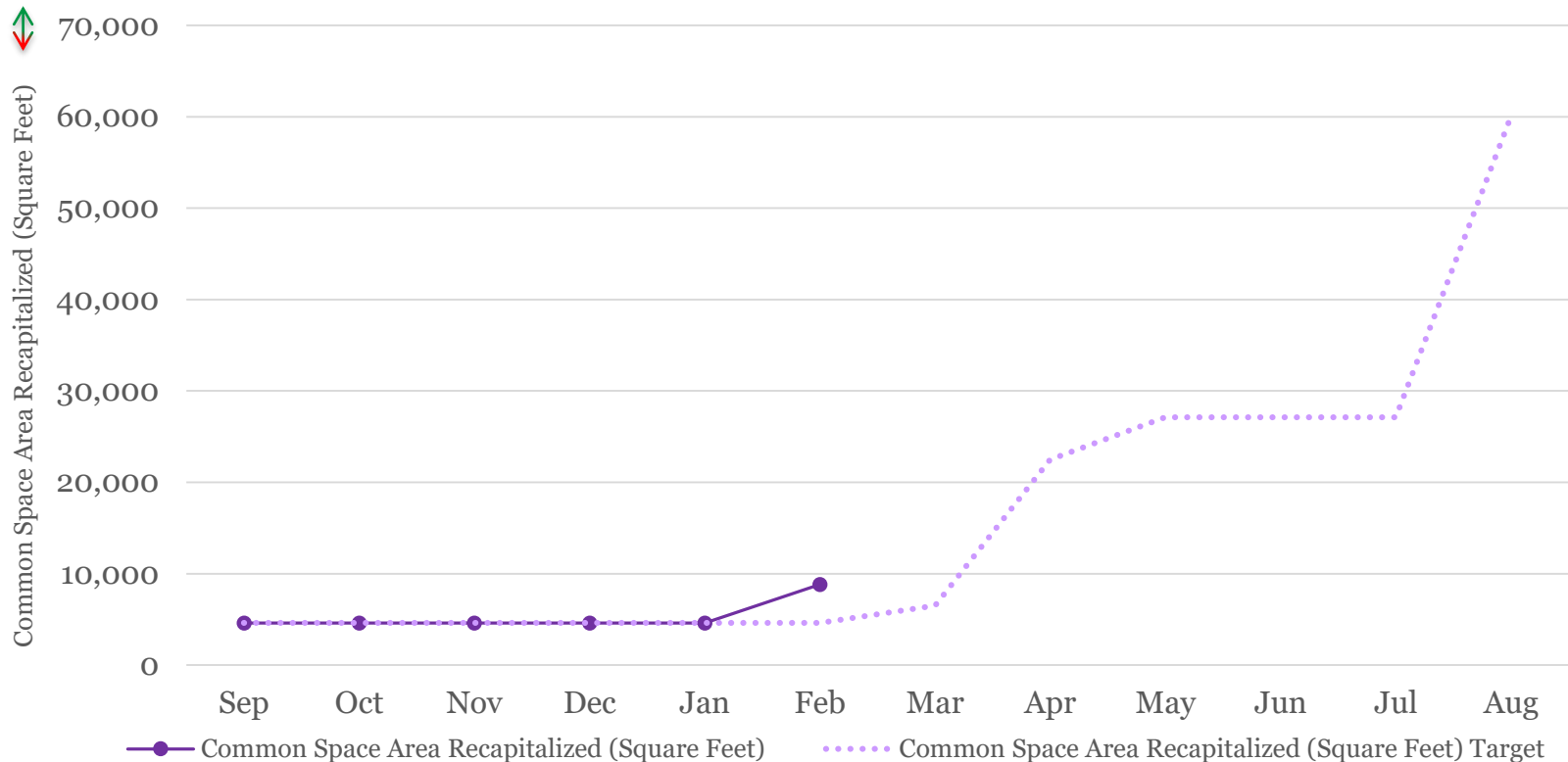
- **KPI goal is to recapitalize 5% of common spaces per year, which represents 55,000 square feet in FY17**
- **f(funding availability, project staffing, efficient decision making, accessibility to work areas)**
- **Initiatives: recapitalization of campus spaces**
- **FM Leader: Carrie West**

LO2. Facilities Connect Implementation
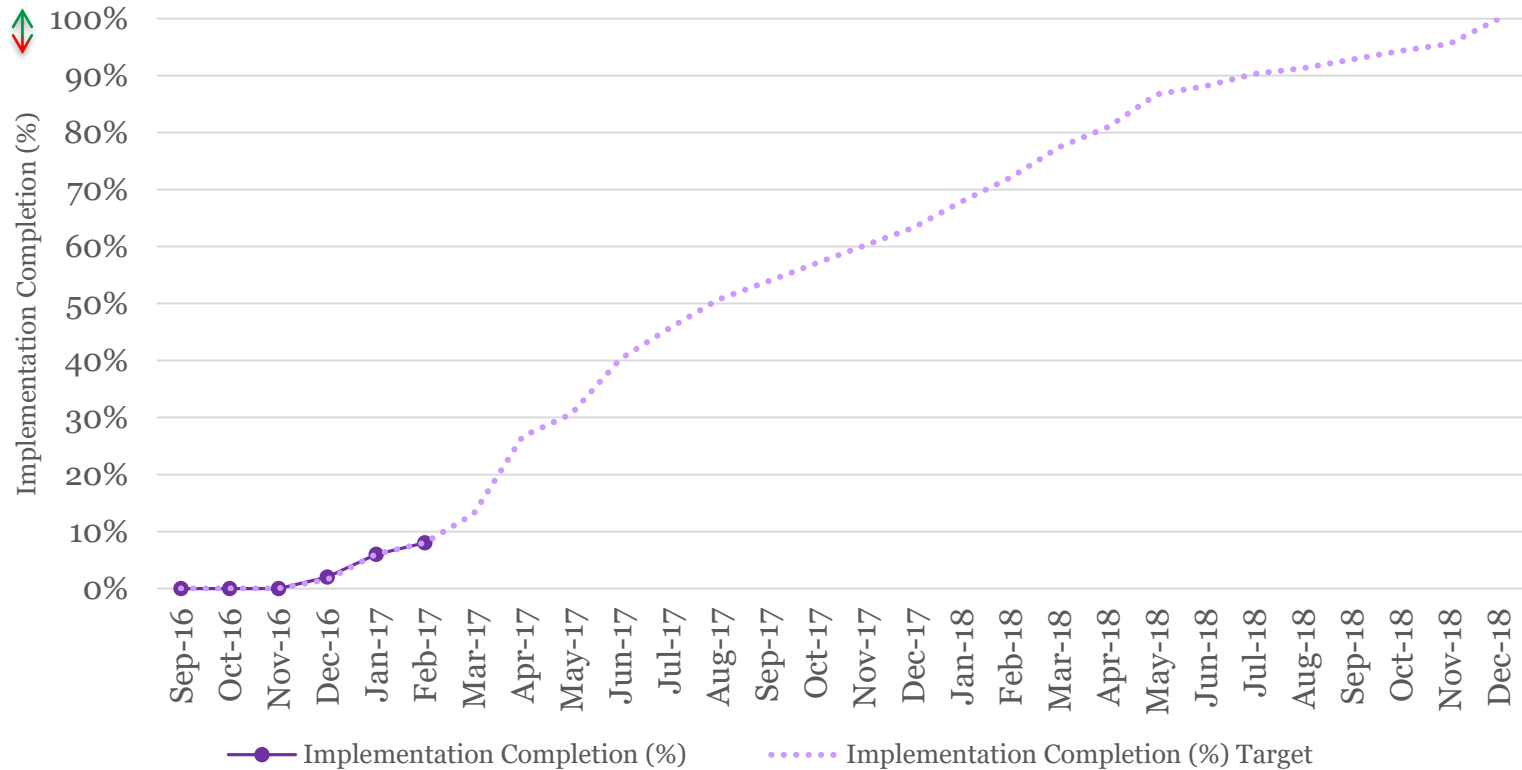
- **KPI goal is to complete 100% of project milestones**
- **f(stakeholder engagement, staffing, business process, IT capabilities, communication, effective decision making)**
- **Initiatives: implement new integrated workplace management software; develop and implement process improvement; utilize effective project management methodology**
- **FM Leader: Liz Schaps**

LO3. Engagement: Sustainability Outreach
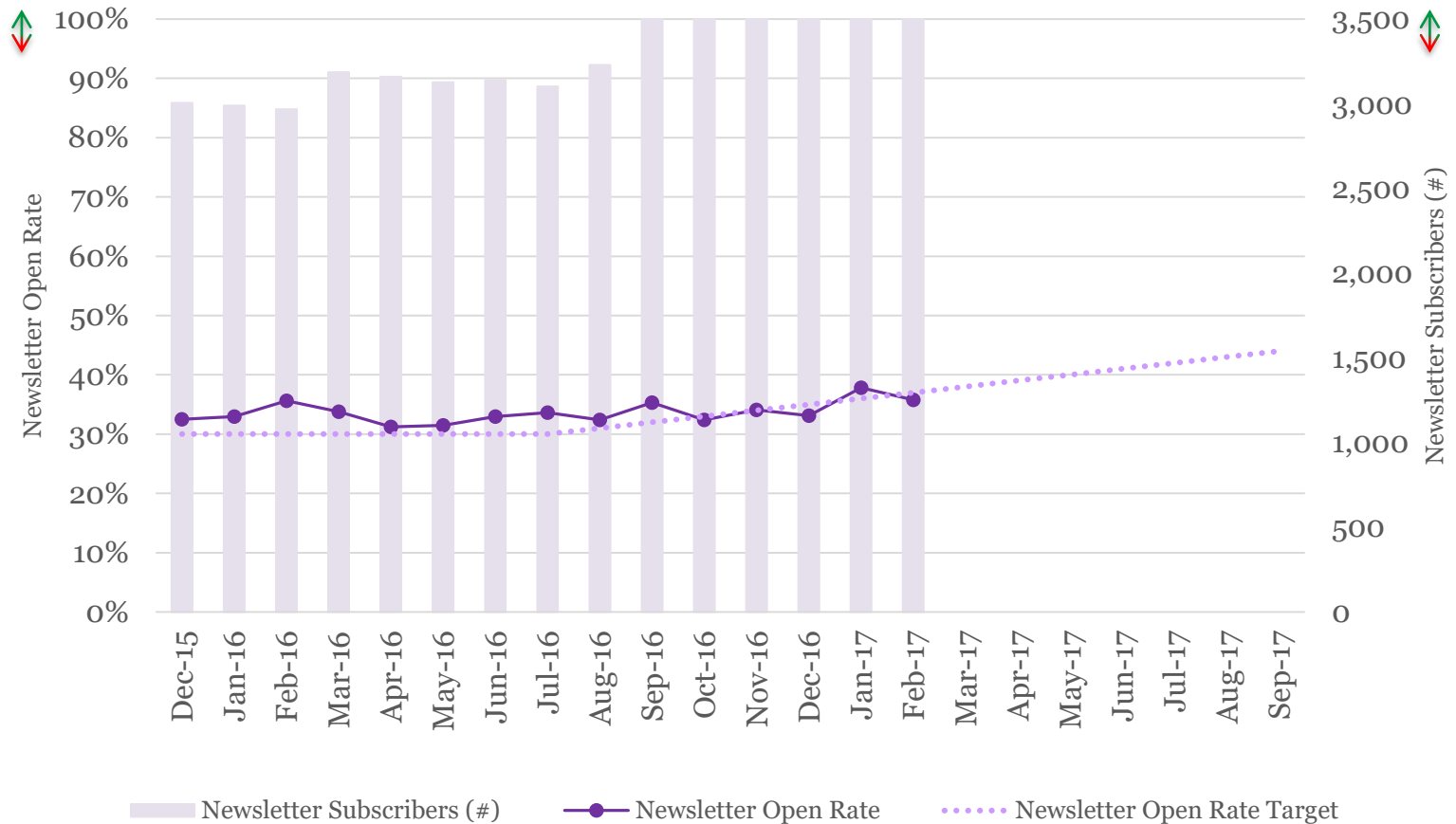
- • **KPI goal is to increase newsletter open rate by 12% annually (1% per month), as a measure of content quality**
- • **f(perceived newsletter quality and value to subscribers, readers interest)**
- • **Initiatives: actively promote newsletter; assess readers interest; increase relevance to readers**
- • **FM Leader: Kathia Benitez**

CE1. Energy Use Intensity

| Campus	% Reduction (2010 Baseline)
Evanston	7.6%
Chicago	6.1%
Combined	7.4%
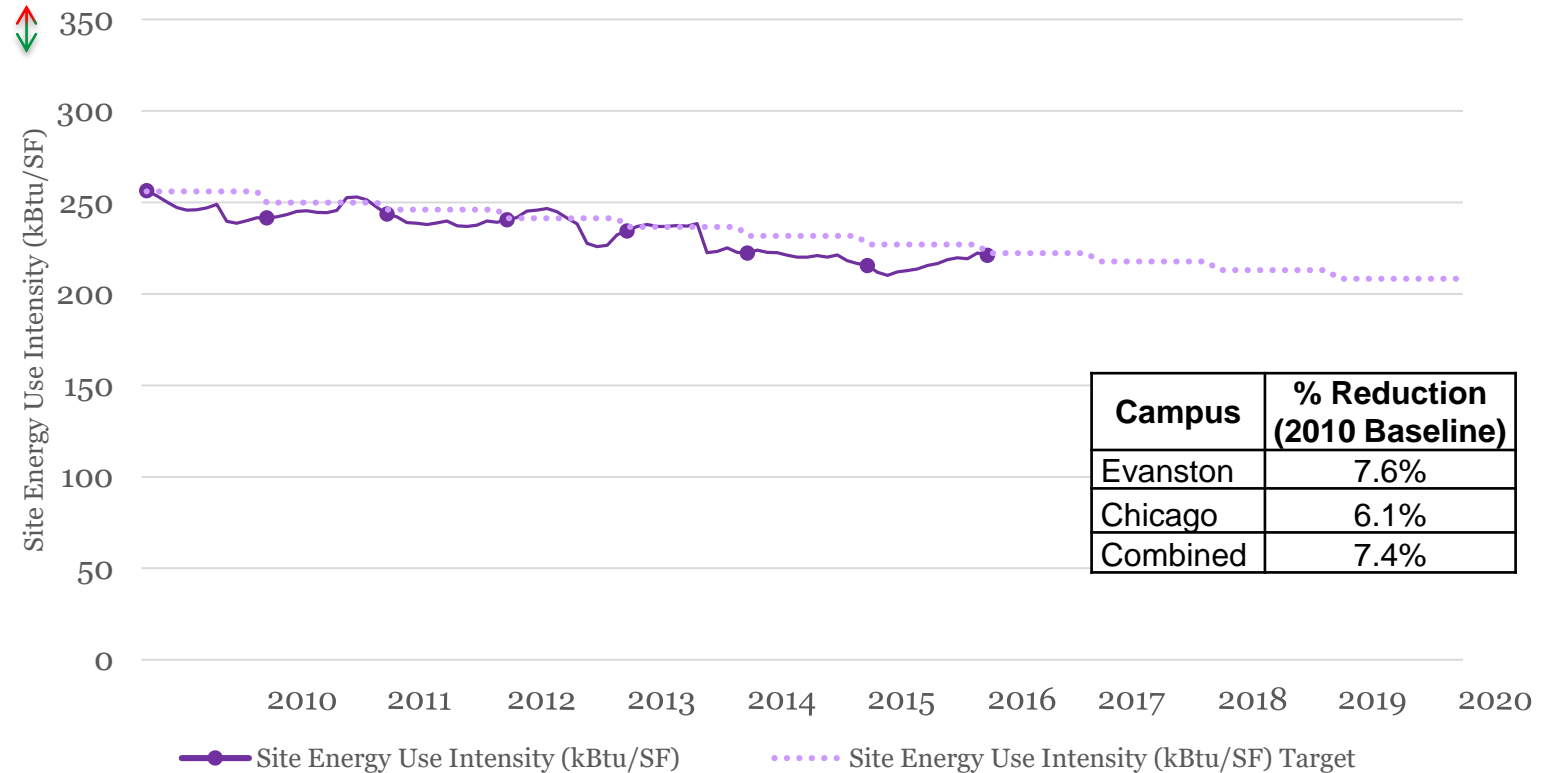
- **KPI goal is to reduce the energy use intensity (EUI) by 20% by 2020**
- **f(occupant behavior, design, construction, technology, operations, weather)**
- **Initiatives: engage occupants; formalize design specifications; perform retro-commissioning; physically audit space for improvement**
- **FM Leader: Kathia Benitez**

# CE2. Recordable Injury Incident Rate
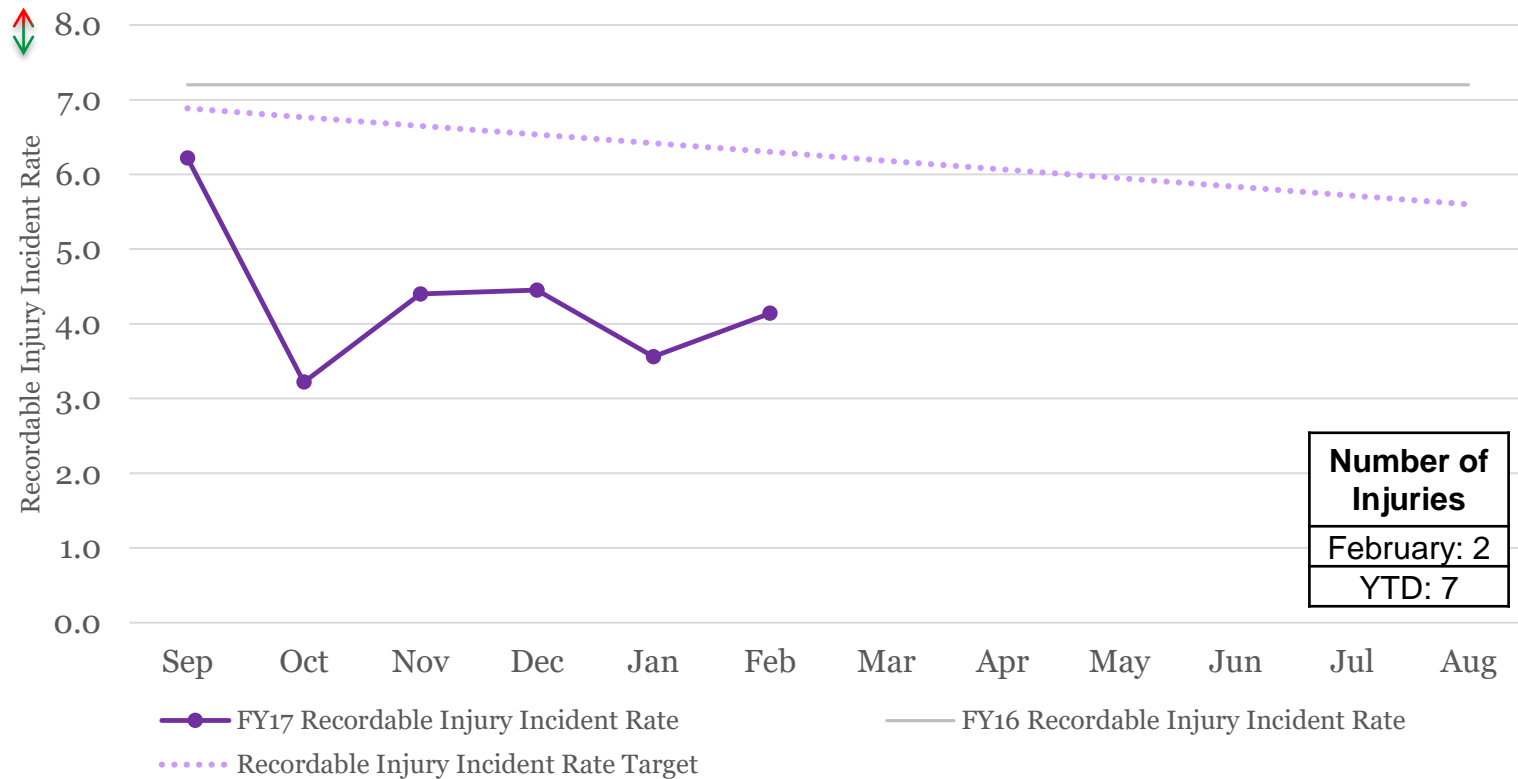
- KPI goal is to reduce OSHA Recordable Injury Incident Rate by 20% from prior year rate of 7.0 to 5.6
- f(equipment, training, behavior, personal protective equipment use)
- Initiatives: inspect equipment and environment; manage personal protective equipment inventory; track personal protective equipment use; train staff; enact monthly safety talks
- FM Leader: Steve Kindrick

CE3. Injury-Related Lost Workday Rate
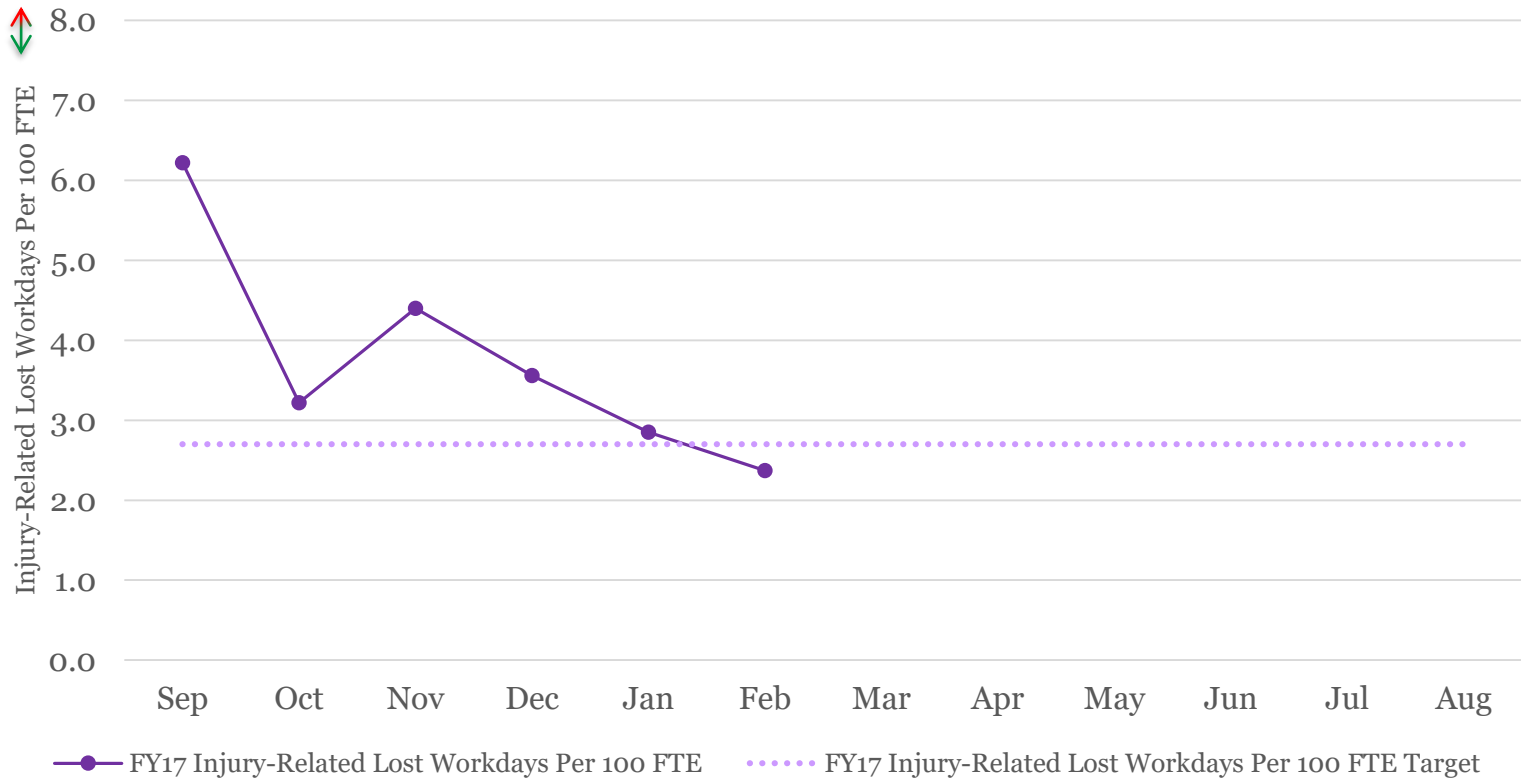
- **KPI goal is to achieve an injury-related lost workday rate of less than 2.7 lost workdays (days away, restricted, or transferred) per 100 full time employees**
- **f(equipment, training, behavior, personal protective equipment use)**
- **Initiatives: inspect equipment and environment; manage personal protective equipment inventory; track personal protective equipment use; train staff; enact monthly safety talks**
- **FM Leader: Steve Kindrick**

CE4. Waste Diversion Rate
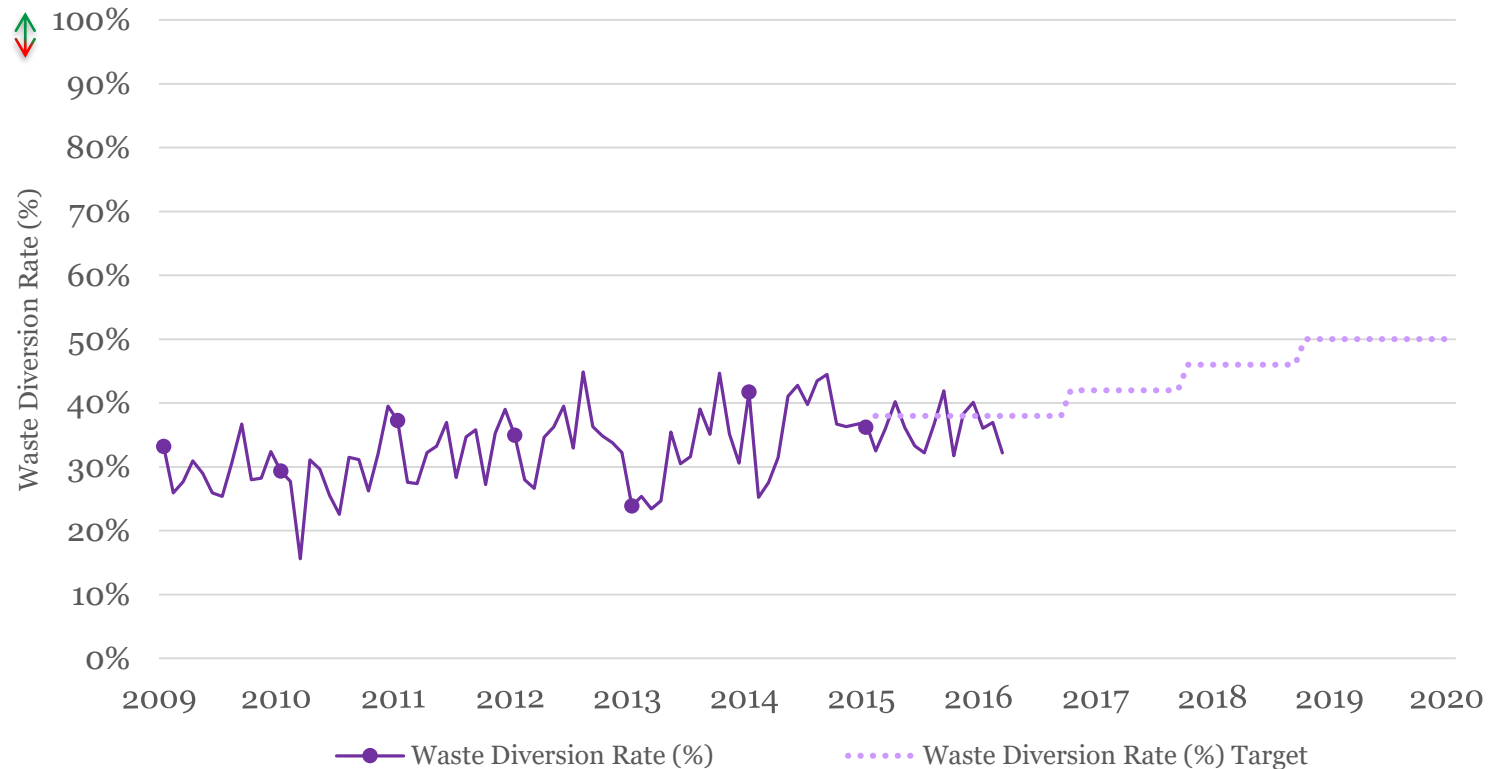
- **KPI goal is a 50% diversion rate by 2020 over 2009 baseline (2% increase in 2017)**
- **f(occupant behavior purchasing, reuse, recycling, diversion, market availability of diversion services)**
- **Initiatives: audit waste; promote landfill diversion via new resource conversation working group, identify new landfill diversion opportunities; train occupants on recycling**
- **FM Leader: Kathia Benitez**

CE5. Overtime
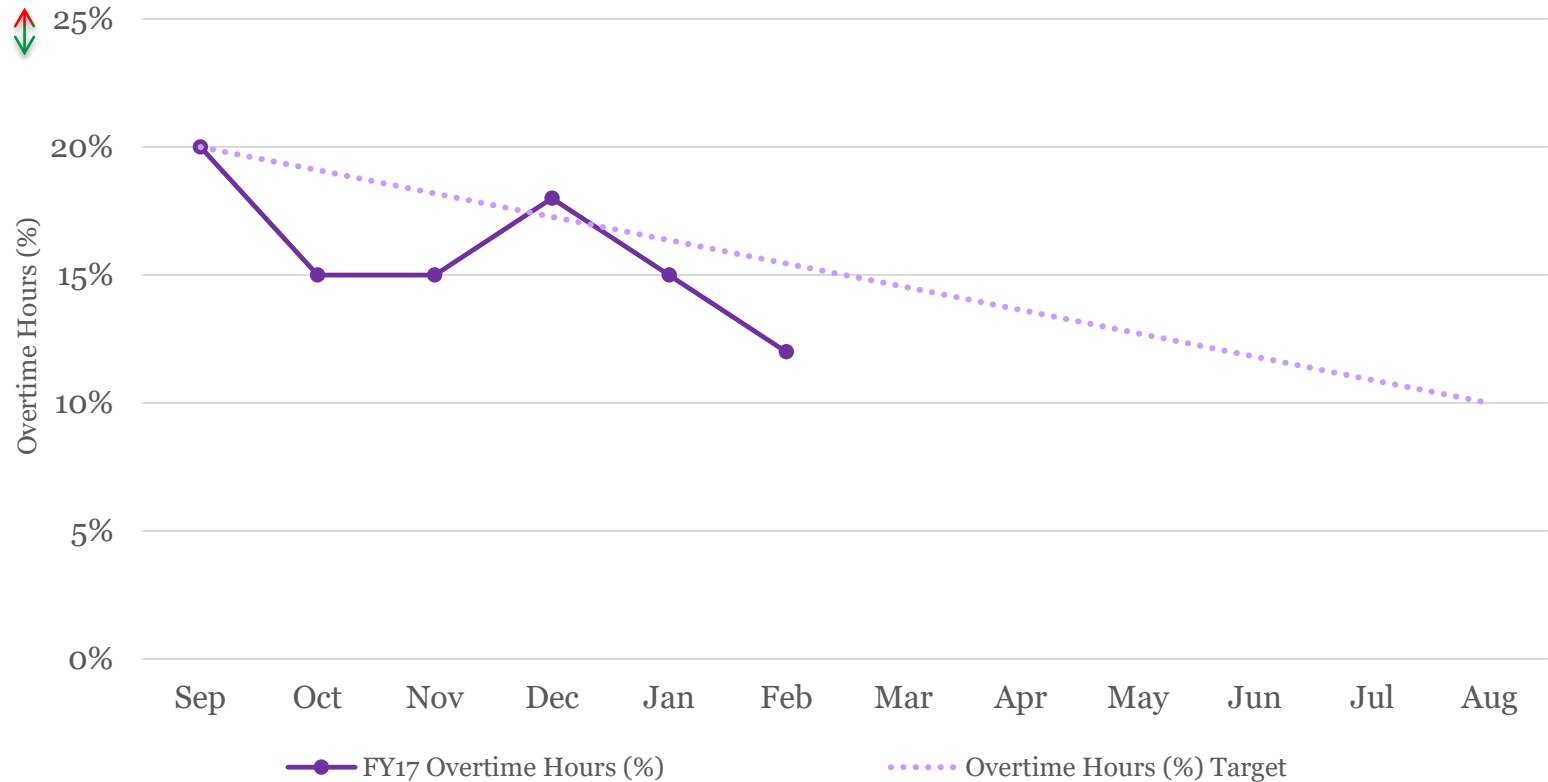
- **KPI goal is to decrease service provider overtime rates to 10% of the total labor hours worked**
- **f(staffing, contracted services, service provider productivity, planning and scheduling of work, accessibility of work areas/equipment, emergency work, off hours project and special event support)**
- **Initiatives: adjust staffing levels to reflect workload levels; supplement staff levels through temporary staff hires and contracted services; increase service provider productivity; plan and schedule work order assignments; adjust shift schedules to improve campus coverage**
- **FM Leader: Steve Kindrick**

# CE6. Minority, Female and Local Business Enterprise Use
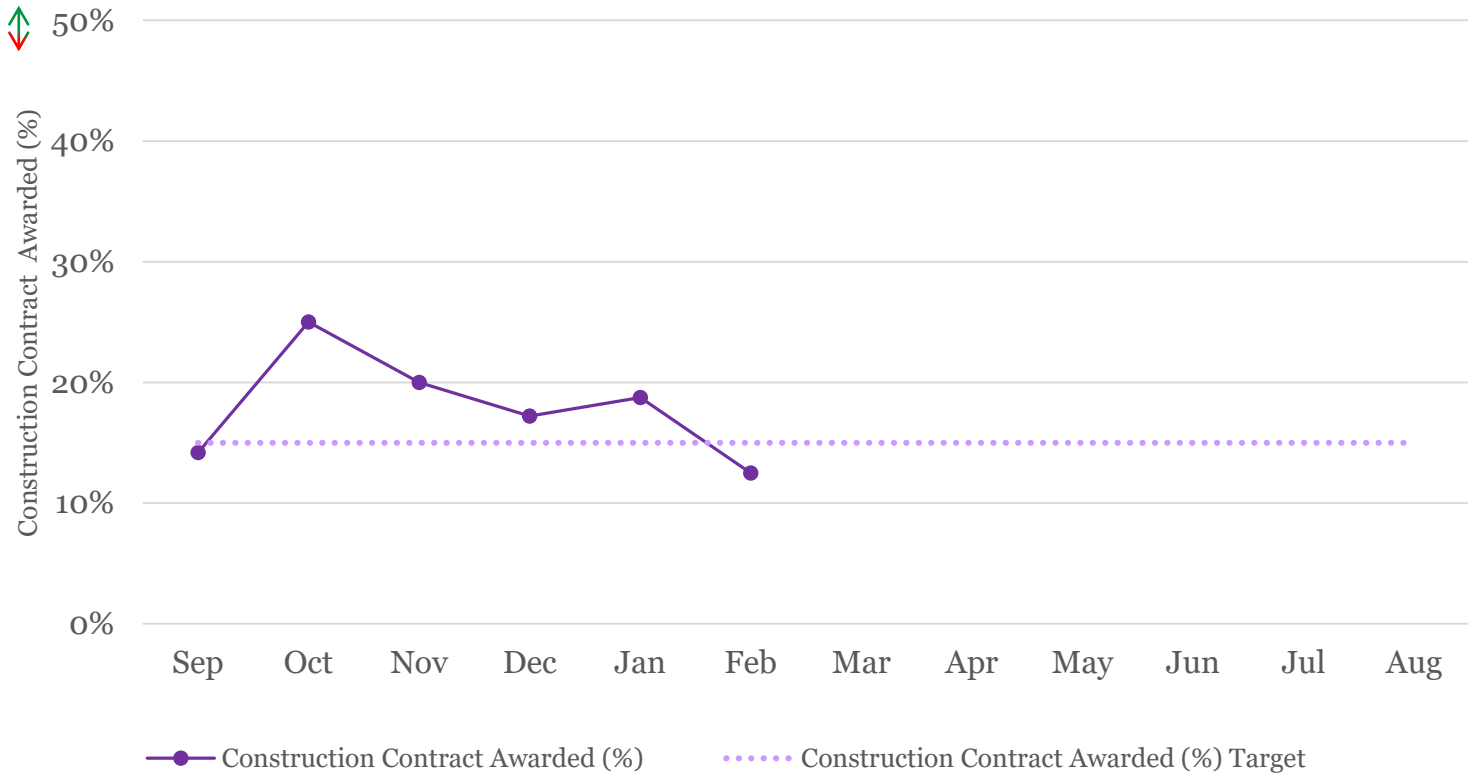
- **KPI goal is to increase Minority, Female and Local Business Enterprise work on campus to 15% of contracts awarded on projects over $25,000**
- **f(contract, bid, qualifying vendor availability in marketplace)**
- **Initiatives: implement new software system; train and educate Project Managers & Contractors; collaborate with Director of Diversity; explore marketplace for new vendors to engage**
- **FM Leader: Liz Schaps**

CE7. Evanston Resident Employment
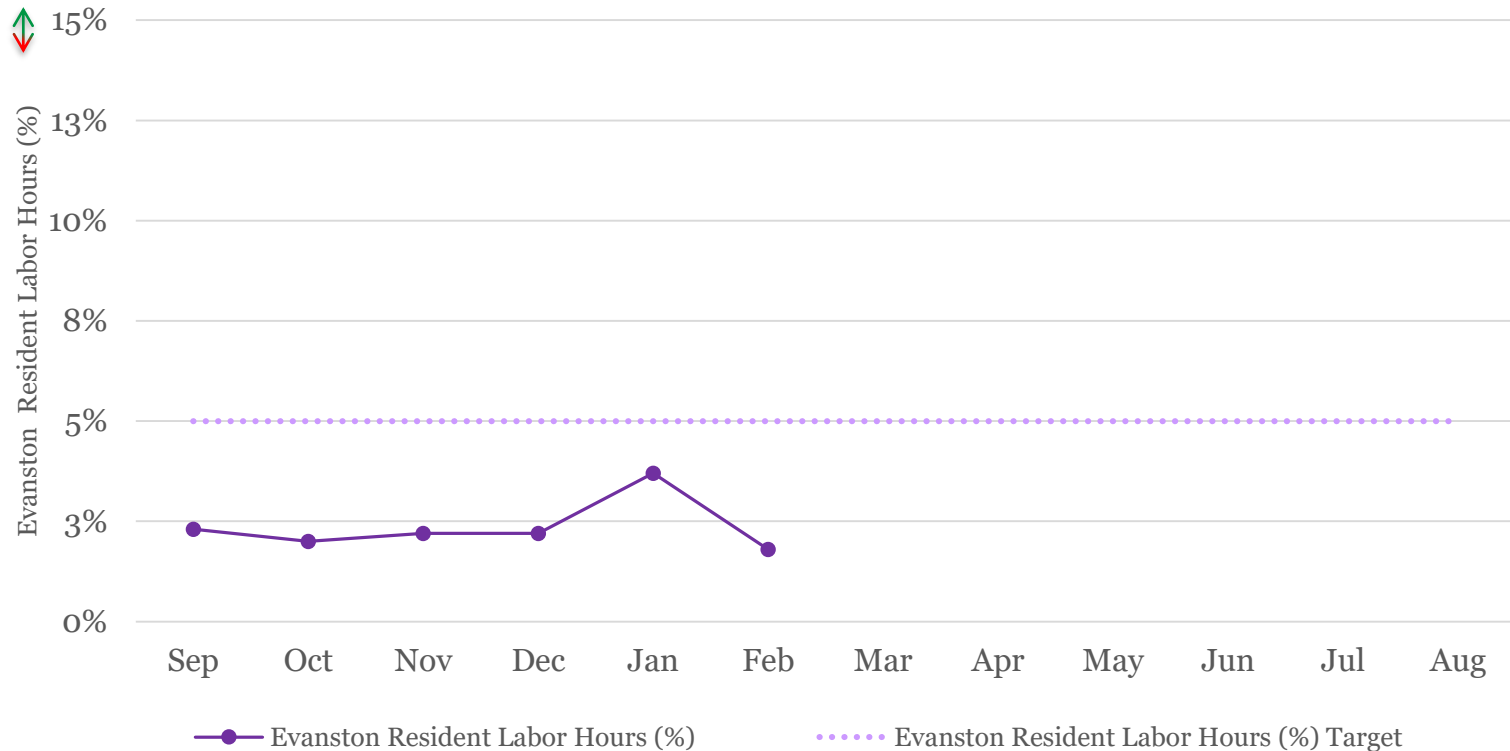
- **KPI goal is 5% of total construction labor hours on qualifying campus projects greater than $1,000,000**
- **f(project qualification, labor market, demand for labor hours, City of Evanston partnership, qualifying Contractor participation)**
- **Initiatives: implement new software system; train and educate Project Managers & Contractors; collaborate with Director of Diversity**
- **FM Leader: Liz Schaps**

F1. Capital Project Cash Flow Execution
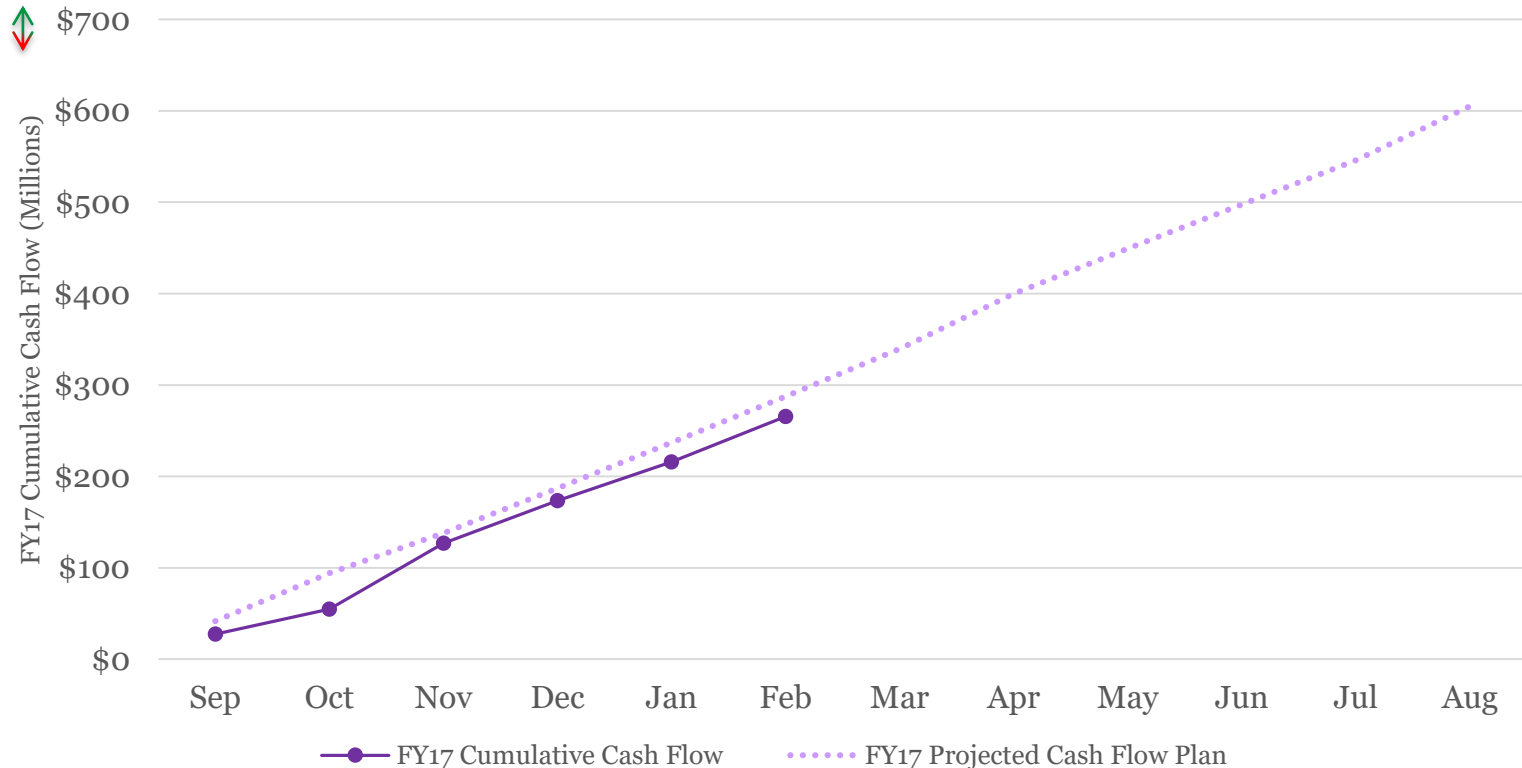
- KPI goal is to spend capital at a rate of +/-2% of committed capital cash flow plan
- f(timely contractor invoicing, unforeseen project conditions, accurate budgeting, scope changes, weather, institutional prioritization, accessibility to work areas/equipment)
- Initiatives: develop and implement process improvement; improve accuracy of cash flow plan; drive timely contractor invoicing; improve reporting; establish and execute project manager cash flow plan
- FM Leader: Liz Schaps

F2. Operating Budget Execution
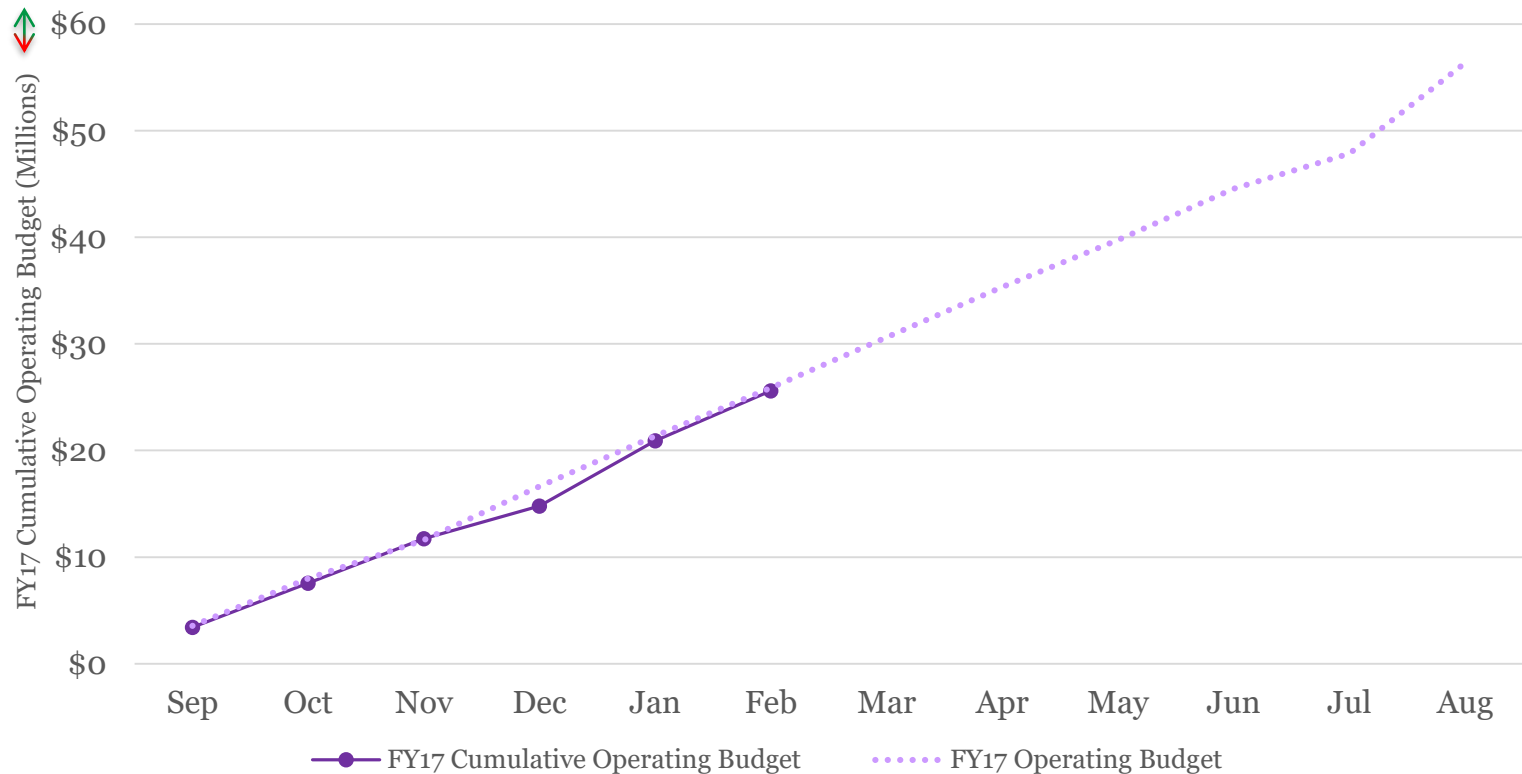
- **KPI goal is to spend operating expenses at a rate of +/- 1% of budget**
- **f(accurate budgeting, labor rates, material costs, campus growth, unanticipated repairs; accessibility to work areas/equipment)**
- **Initiatives: develop and implement process improvement; improve reporting; adhere to preventative maintenance plan; manage overtime expenses**
- **FM Leader: Liz Schaps**

F3. Utility Commodity Budget Execution
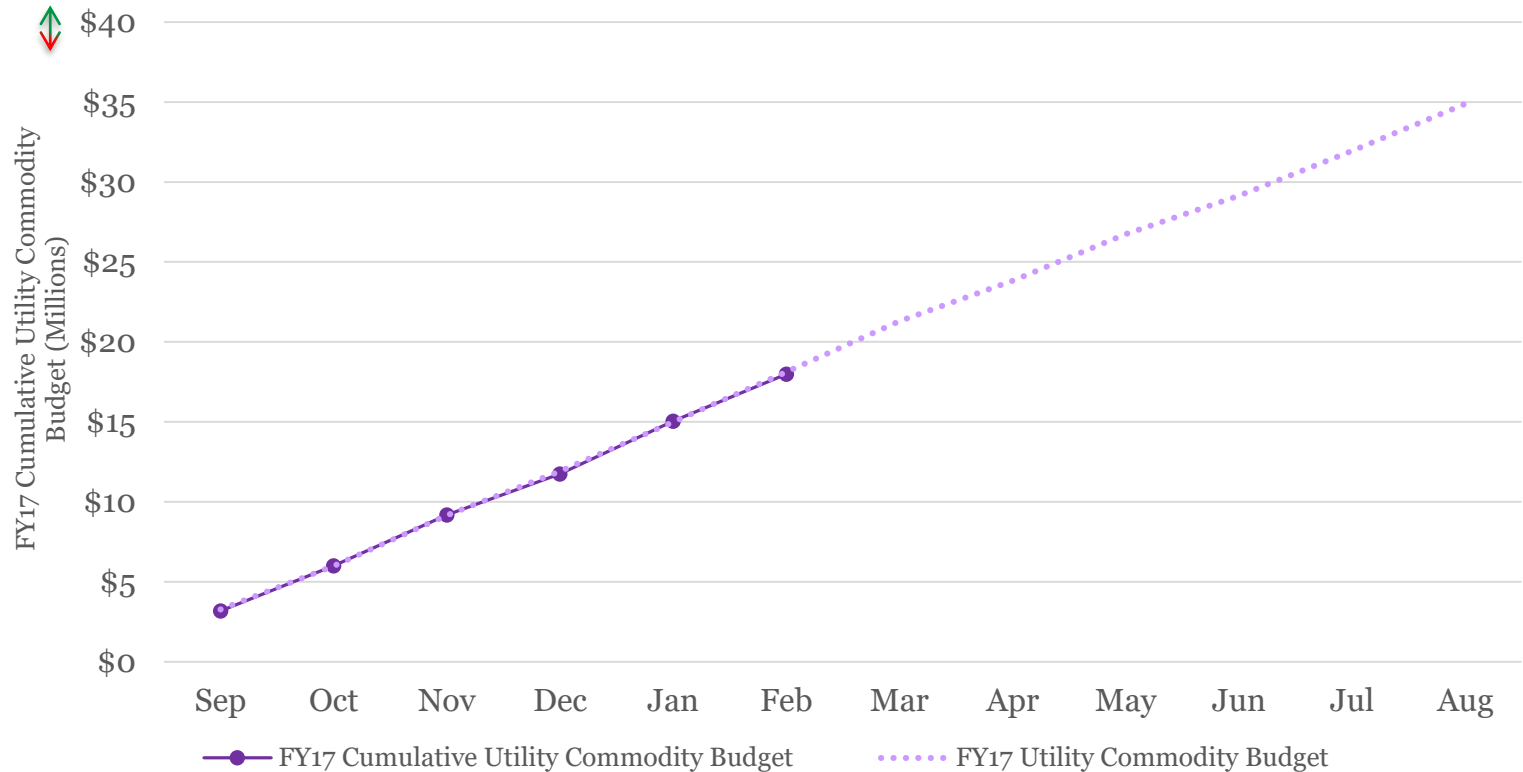
- **KPI goal is to manage utility commodity expenses at a rate of +/- 5% of budget**
- **f(accurate budgeting, utility commodity costs, campus growth, usage)**
- **Initiatives: adhere to sourcing strategy; improve reporting**
- **FM Leader: Liz Schaps**